



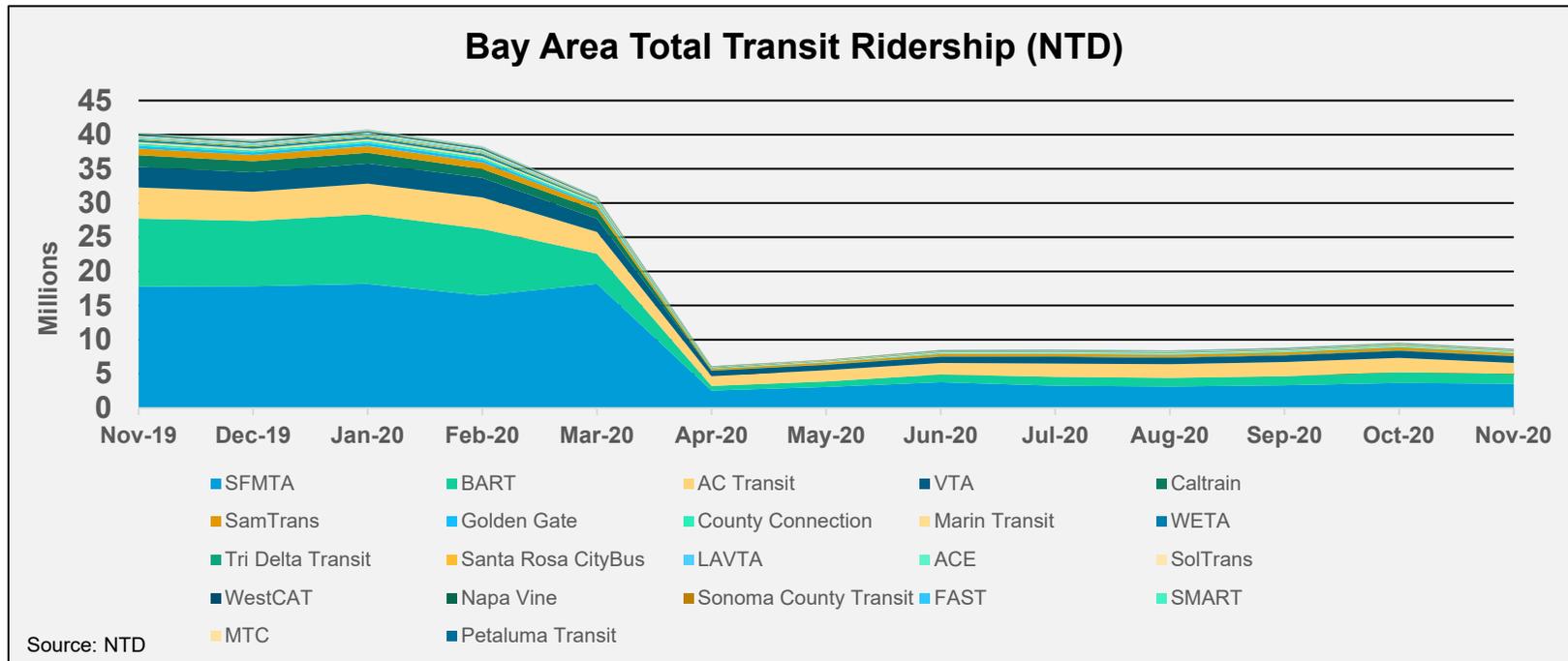
BAY AREA TRANSIT OPERATOR FINANCIAL & SERVICE STATUS UPDATE

Photo: SMART staff

TRANSIT RIDERSHIP

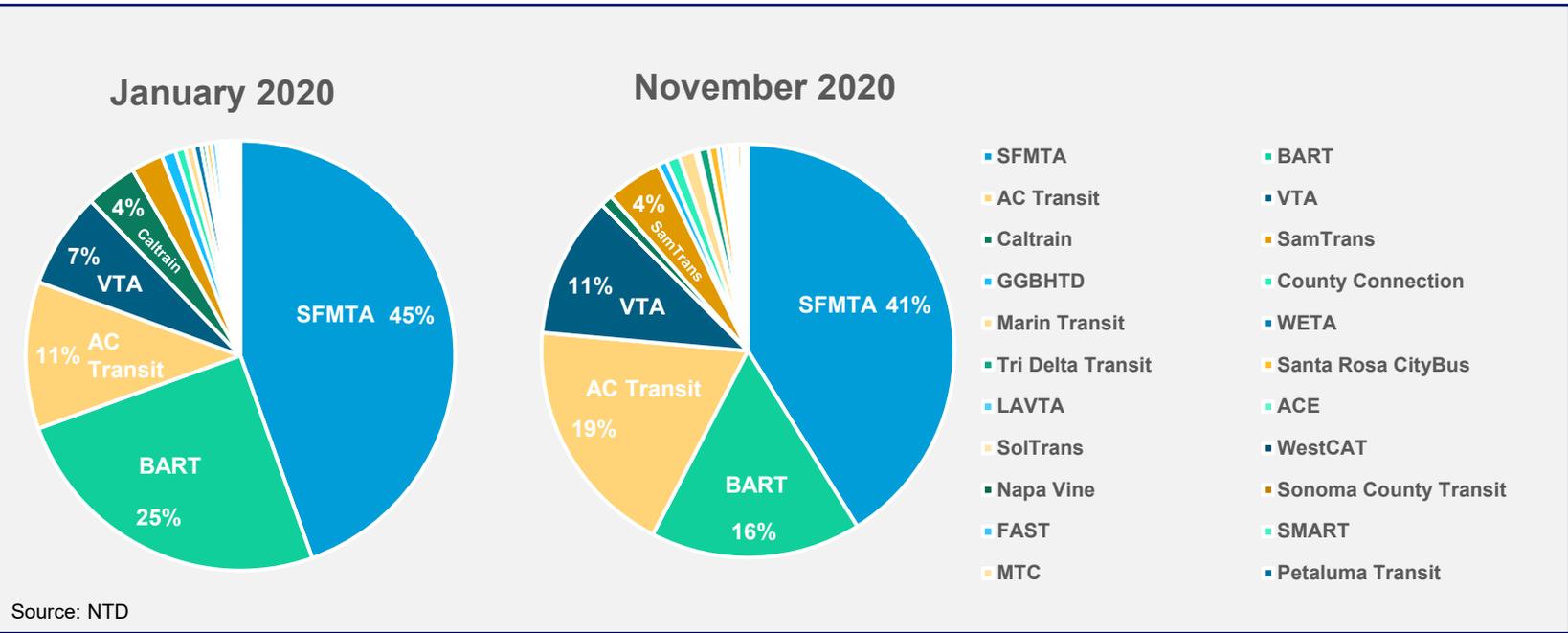
Bay Area ridership has declined 80%, comparing April-November 2020 to the same period in 2019.

The sharpest declines are among operators that disproportionately carried peak hour commuters pre-pandemic such as BART, Caltrain, Golden Gate, and WETA. Small bus operators that served, and continue to serve, more transit-dependent riders have seen a somewhat greater ridership recovery.



RIDERSHIP BY OPERATOR

Ridership patterns by operator have shifted since the pandemic. AC Transit is currently carrying more passengers than BART. Ridership on VTA has also increased from 7 to 11% of regional ridership



STUDENT RIDERSHIP

Student transit users comprise a significant percentage of ridership for some operators. This creates a “ceiling” on ridership recovery until in-person education resumes.

8.1 million

trips per month

Average number of trips taken by students (K-12, post-secondary) each month in the Bay Area, pre-COVID-19.

100+

School only/supplemental routes

Number of special student targeted services operated Bay Area-wide pre-COVID-19.

15%

of riders

Bay Area-wide share of pre-COVID-19 ridership that were (K-12, post-secondary) students.

The share varies by operator, with some operators' ridership consisting of 40% students.

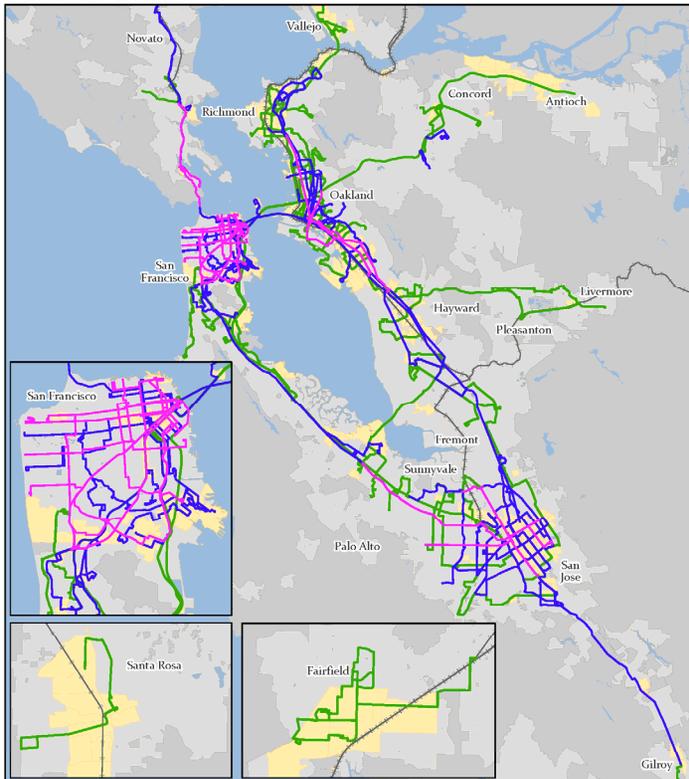
Operators with approx. 20%+ student ridership:

- SFMTA
- AC Transit
- VTA
- Marin Transit
- Union City Transit
- Petaluma Transit
- LAVTA
- WestCAT
- Santa Rosa CityBus
- SamTrans

Source: Operator data, passenger surveys

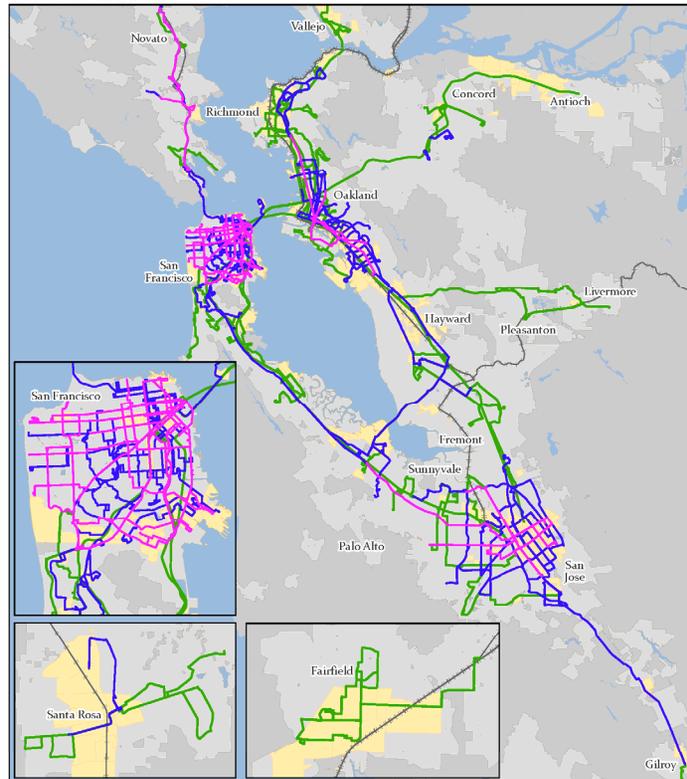
SERVICE FREQUENCY CHANGES

Summer 2020



Frequency (minutes)
 — 10 min. or better — 11 to 20 min. — 21 to 30 min. — Community of Concern (MTC) — SMART/ACE/Capitol Corridor

Winter 2021

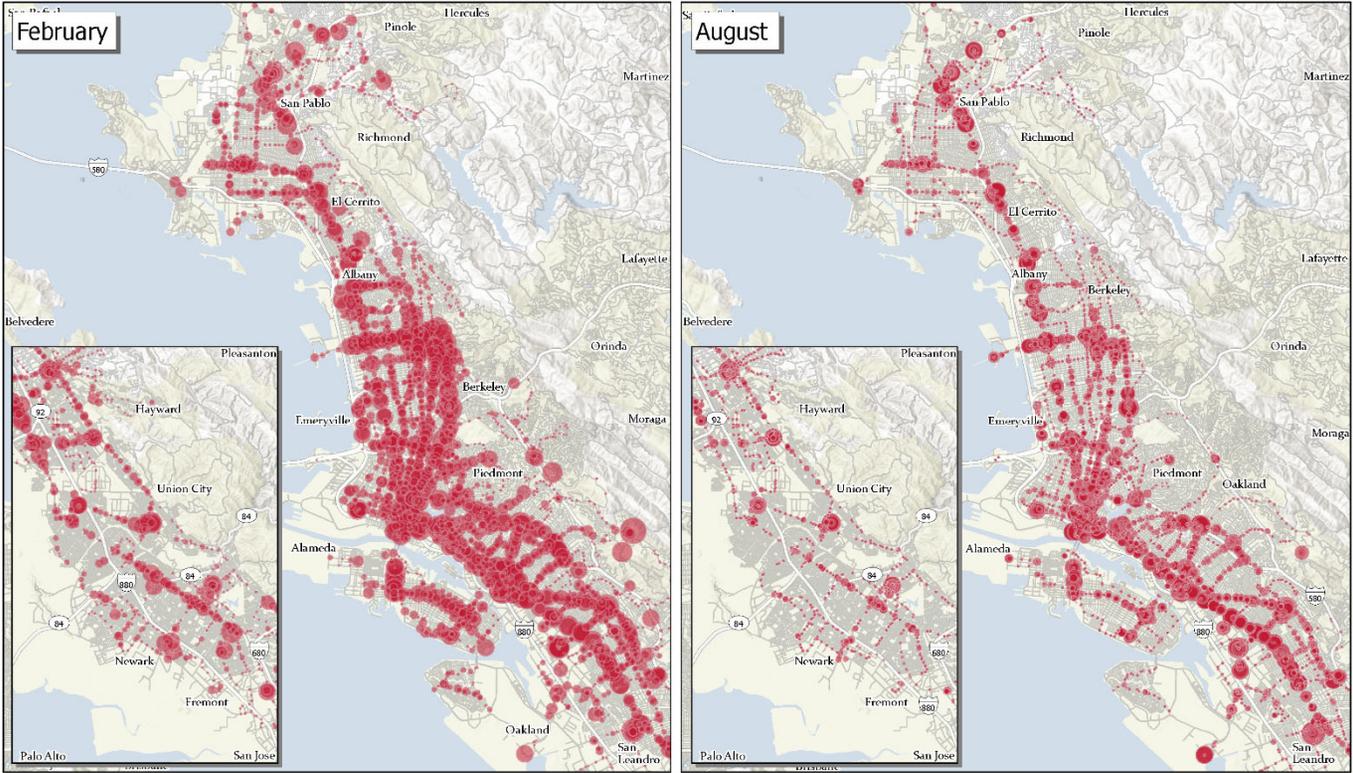


High Frequency Transit Corridors During COVID 19
 Data provided by transit operators. Produced by SamTrans Planning for MTC, February 2021

Almost all operators increased frequency on some corridors or routes since the summer of 2020 to improve service in core areas and to support local trips.

This is most pronounced for SFMTA, which reinstated some routes that were previously suspended.

CHANGES IN WHERE THE SYSTEM IS BEING USED – AC TRANSIT



Average Weekday Ridership

-
-
-
-

≤10 ≤100 ≤1,000 ≤2,200

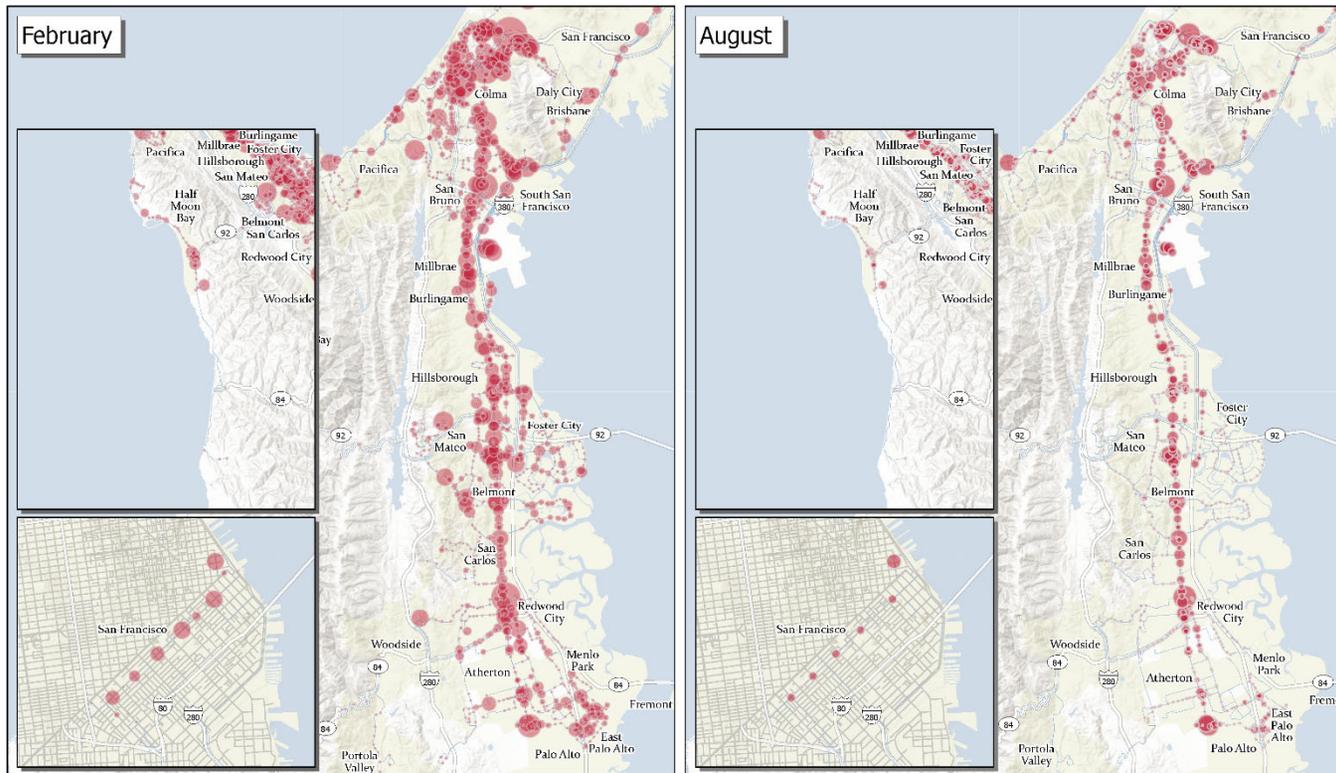
AC Transit Average Weekday Ridership
2020, Pre- and Post- Pandemic

Data provided by AC Transit. Map produced by SamTrans Planning for MTC, 2021

Overall AC Transit ridership decreased by 56% between February and August 2020.

The impacts vary geographically, with greater ridership retainment in certain communities of Richmond, San Pablo and East Oakland.

CHANGES IN WHERE THE SYSTEM IS BEING USED – SAMTRANS



Average Weekday Ridership
 • ≤10 • ≤100 • ≤1,000 • ≤2,000 — SamTrans Route

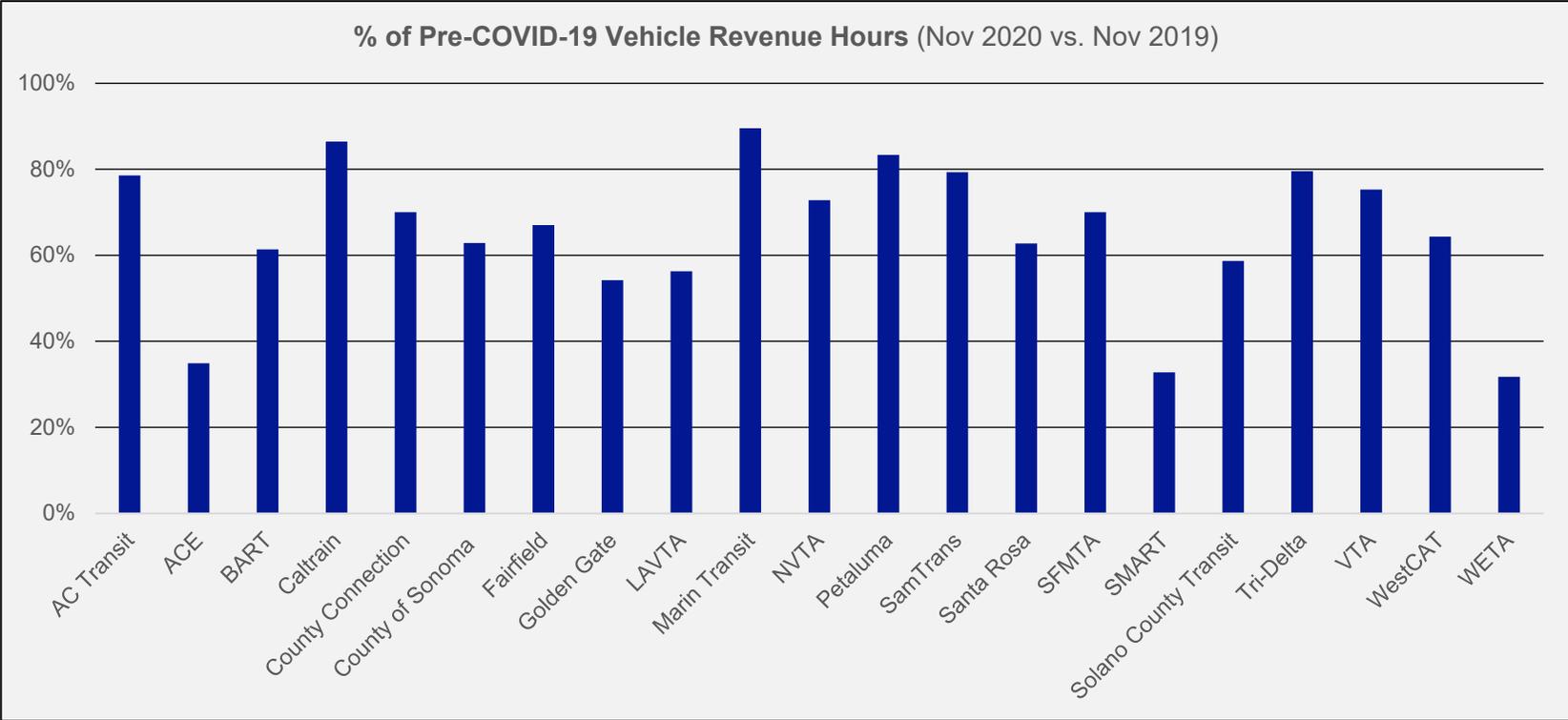
SamTrans Average Weekday Ridership
 2020, Pre- and Post- Pandemic
 Map produced by SamTrans Planning for MTC, 2021

Overall SamTrans ridership decreased by 63% between February and August 2020.

Similar to the geographic variance shown in the AC Transit map, ridership retainment was greater along El Camino Real and in Daly City.

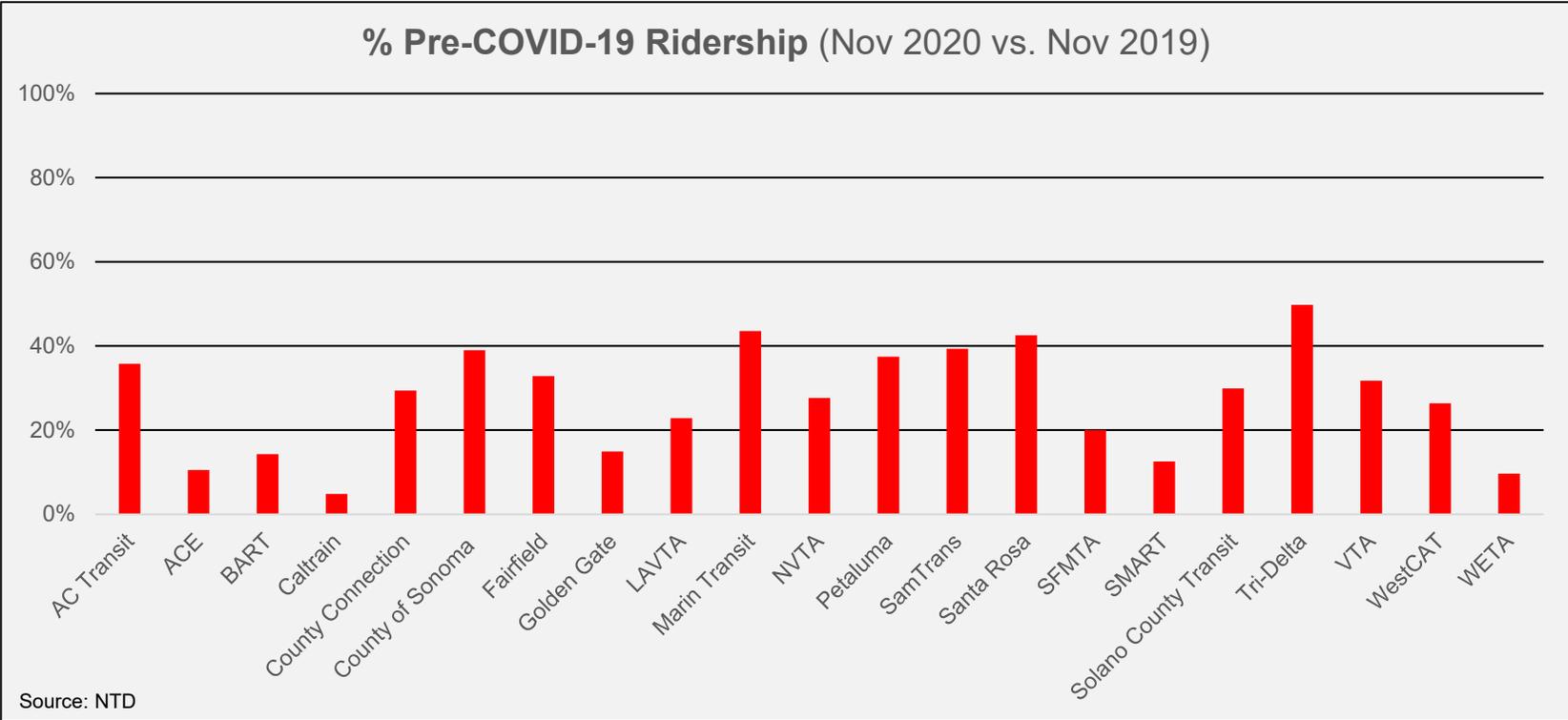
TOTAL VEHICLE REVENUE HOURS

As a % of pre-COVID-19 service levels, service varies dramatically across operators. While some are operating at 80-90% of pre-pandemic levels, others are at around 30%.



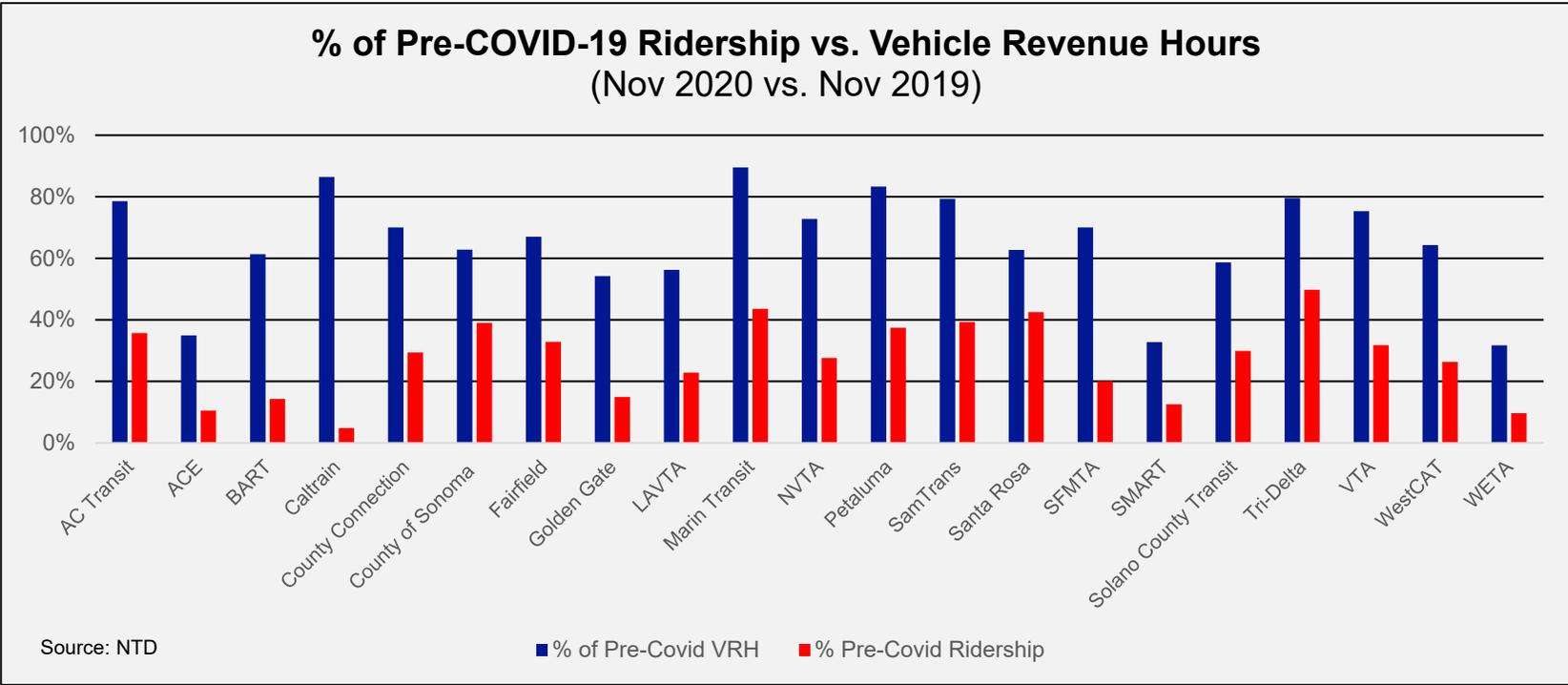
TOTAL RIDERSHIP

Region-wide, ridership in November 2020 was 20% of ridership in November 2019. Across operators, this figure ranges from 5% to 50% of pre-pandemic levels.



VEHICLE REVENUE HOURS & RIDERSHIP

Region-wide, operators are serving 20% of pre-COVID ridership with 60% of pre-COVID service, as measured by total vehicle revenue hours.



PASSENGER “PASS UPS”

Capacity on transit vehicles has been reduced to adhere to social distancing policies. This has created a challenge for many operators, and a situation where some passengers are “passed up” on vehicles are already at their reduced capacities.

2,000
passengers per day
Approximate number of passengers being “passed up”

Agency data on pass ups are inconsistent, given challenges of quantifying it.

- SFMTA has reported up to 800 pass-ups per day in the fall.
- VTA has reported an average of over 500 pass-ups per day
- AC Transit has reported overcrowding on 12% of its trips

Why pass ups occur:

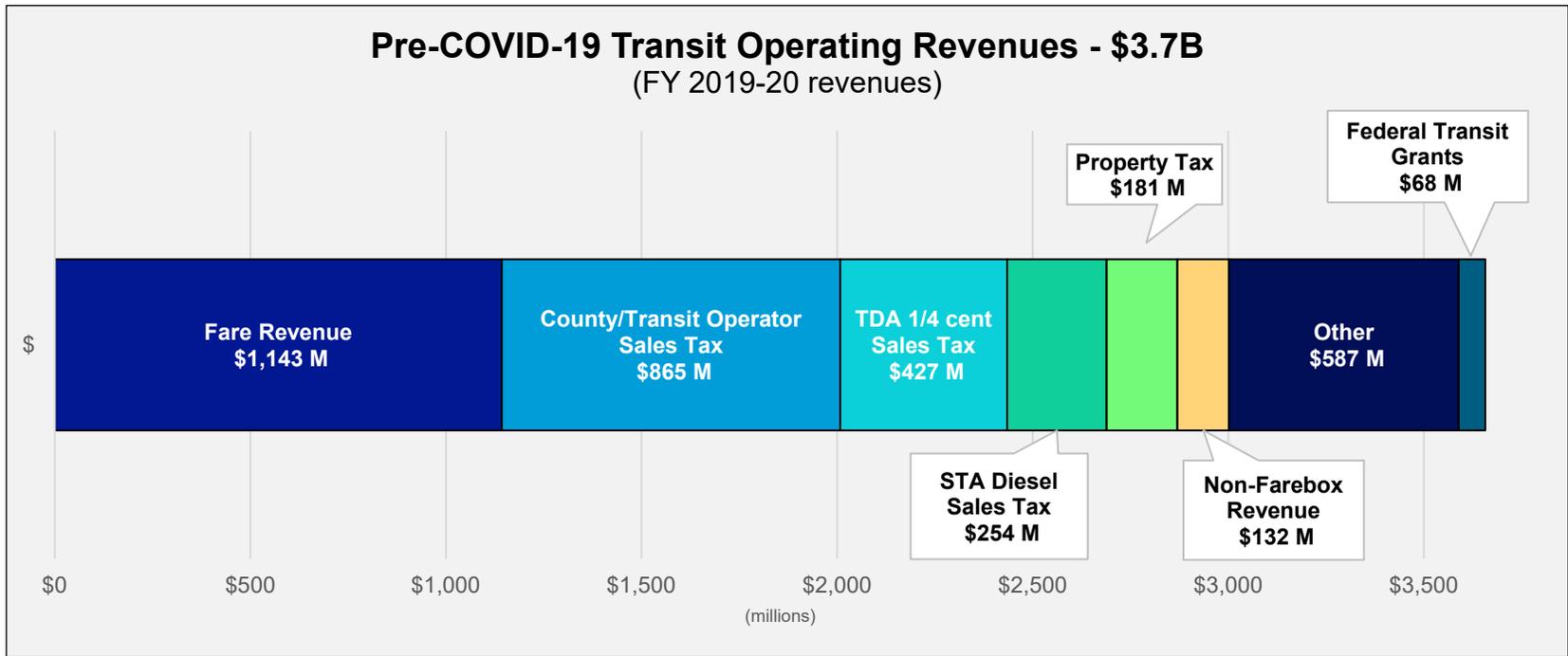
- Reduced capacity to manage social distancing
 - Buses, on average, now operate at 20% of capacity
 - A bus that would normally serve up to 100, is now limited to 24
- Reduced service to reflect lower ridership overall and uncertain resources

What can we do to ensure every rider who needs a ride has access to one?

- Back up service has been deployed on many operators, targeting stations or areas with a high amount of pass ups
- Service levels have been increased in some places where demand has recovered

OPERATING REVENUE : PRE-COVID-19

Pre-pandemic, Bay Area transit operations were funded with a diverse mix of sources, including fare revenue and various sales taxes.

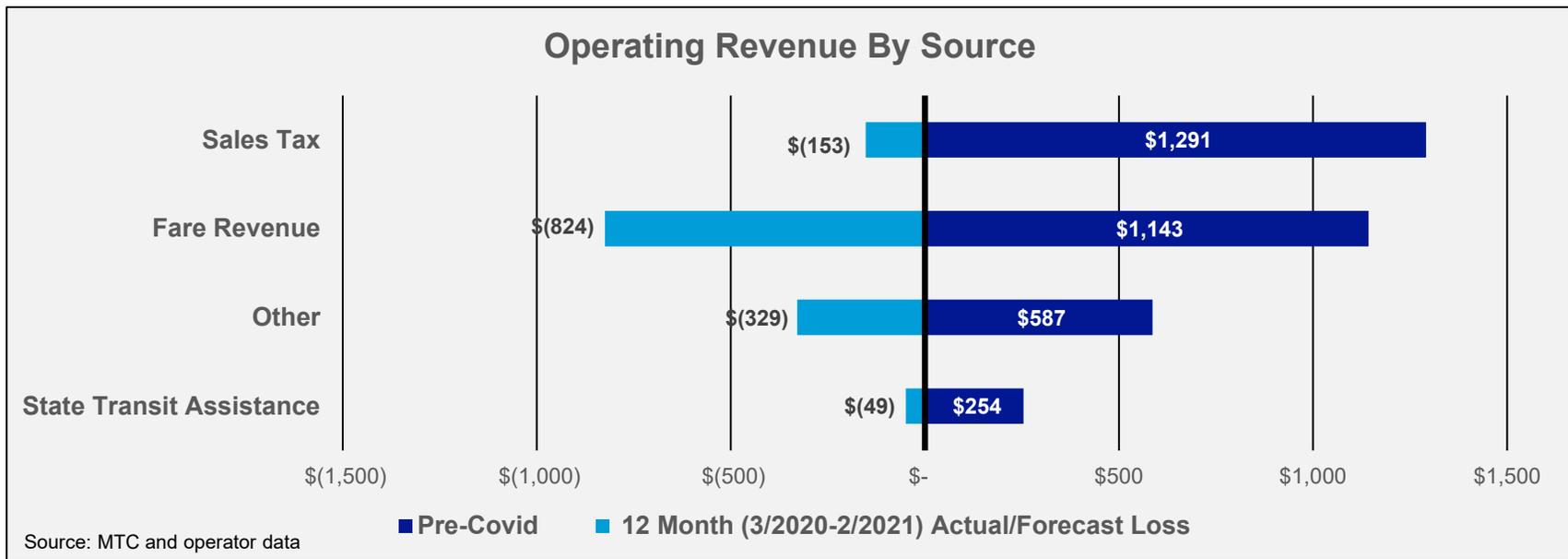


Source: Transportation Development Act Claims to MTC
MTC Fund Estimate, State Budget

OPERATING REVENUE LOSS

Transit agencies have lost over **\$1.1 Billion** in revenues between March and December 2020, at a rate of nearly \$110 million per month. Of the funding mix, fare revenues have been most severely impacted.

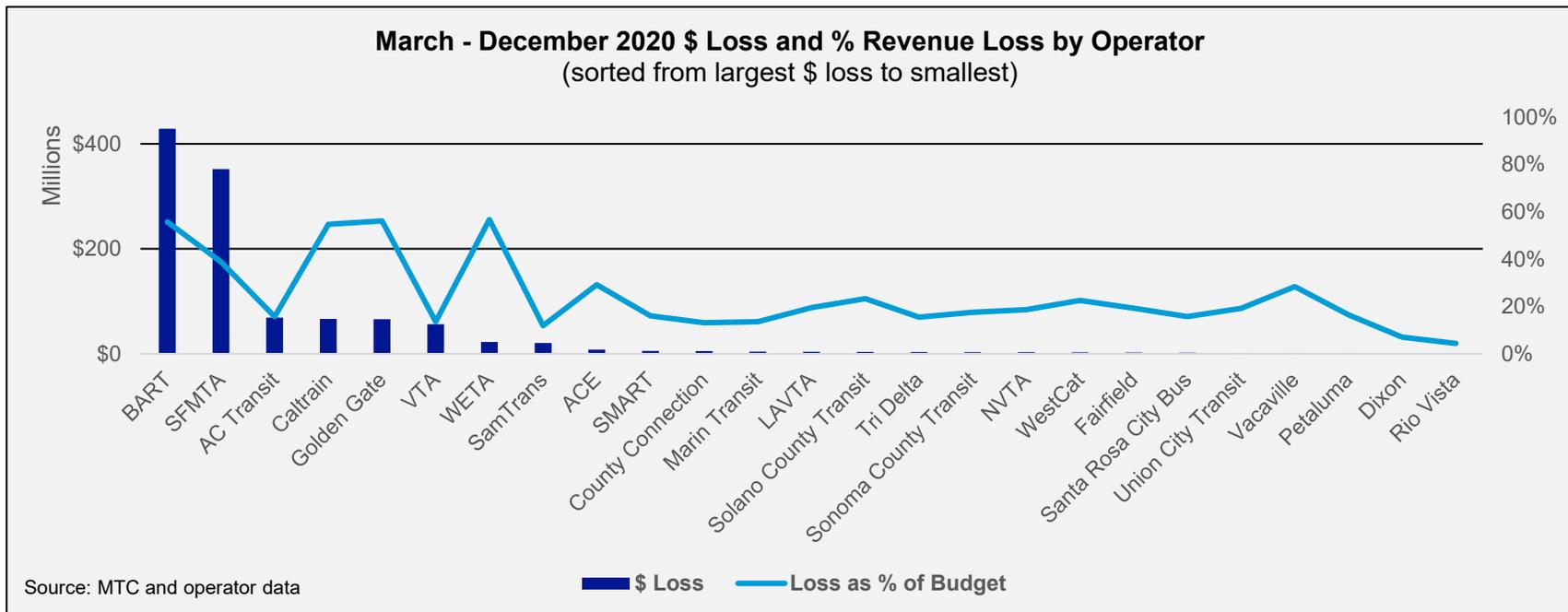
At this rate, the region would lose \$1.3 billion over a 12-month period, or over a third of pre-pandemic operating revenues.



OPERATING REVENUE LOSS

Revenue impacts have varied greatly by operator. Revenue loss between March and December of 2020 as a % of FY 2018-19 budgets range from the single digits to 57%.

Impacts have been especially significant for fare, parking, and toll revenue-dependent operators, such as BART, Caltrain, Golden Gate, SFMTA, and WETA.



TOTAL STAFFING IMPACTS

Service plan and revenue reductions have impacted staffing levels across operators. Across all operators, **total staff levels (including directly employed and contract staff) have decreased by over 1,000 employees, or 6% of pre-Covid staffing.**

Nearly all operators have implemented a hiring freeze or wage freeze as well as limits on overtime. Other efforts to manage staff levels include early retirement programs and shifting staff from operations to capital projects.



Staffing Changes at Selected Operators

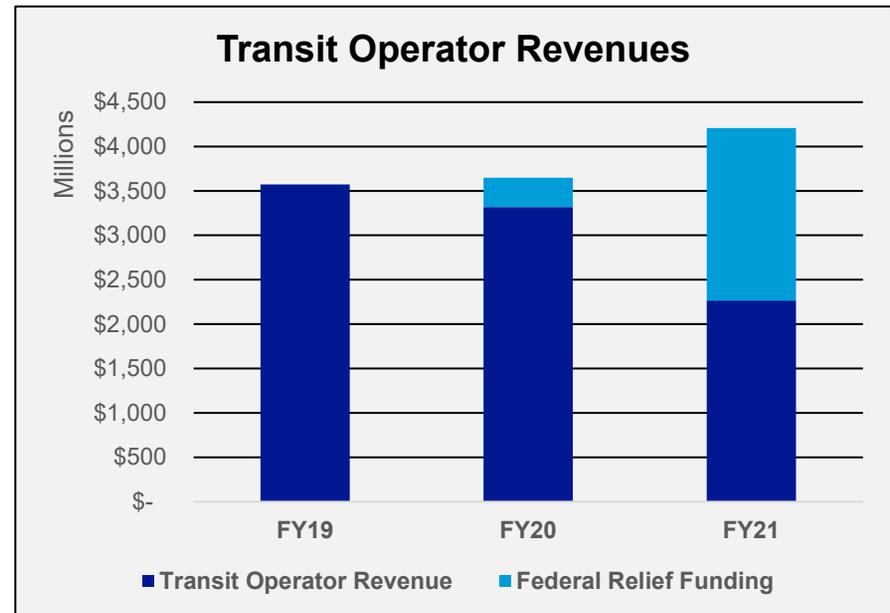
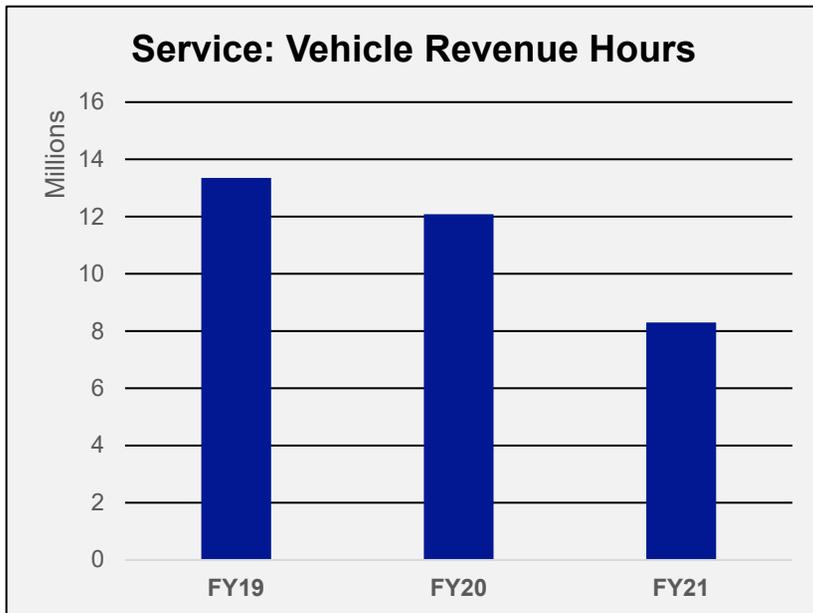
Operator	January 2020 Staff	January 2021 Staff	% Change
BART	5,087	4,384	-14%
AC Transit	2,137	2,059	-4%
VTA	2,122	2,076	-2%
Caltrain	521	471	-10%
LAVTA	148	118	-20%
SFMTA	4,569	4,702	+3%

Source: Operator data

FINDING THE BALANCE: BUDGET CAUTION VS SERVICE

While Bay Area transit operators are projected to lose \$1.3 billion over the first 12 months of the pandemic, the federal government has already allocated **\$2.2 billion** in relief funding to the Bay Area.

Operators face a difficult choice in deciding when to increase service to meet current and future demand while not knowing what future revenue levels will look like.



Source: MTC and operator data

OUTLOOK TO RESTORE SERVICE

Transit operators face important decisions over the next few months.

- How might the rate of vaccine roll out and community penetration affect transit demand?
- How will customers view the level of service as sufficient or reliable?
- And how is this factored into budget decisions?

Many riders likely won't come back without sufficient service levels and confidence that transit will be there for them, creating a "chicken or the egg" problem.

1 month - 9 months

Amount of lead time needed by operators to increase service

Lead time varies by agency based established processes to adjust service several times a year, along with collective bargaining agreements.

Requirements to make service changes vary between operators, and include:

- Planning and analysis
- Coordination with partner agencies
- Public outreach
- Formal public hearings
- Title VI analyses
- Board approval





THANK YOU.